



Software Help Sheet 7: Building Rosters to Record Congregate Meal Service Deliveries

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What is a Roster?

Entering service deliveries one consumer at a time is extremely inefficient. SAMS *Rosters* were designed to encourage efficient service data entry.

Rosters are custom, filtered lists of consumers displayed in a spreadsheet fashion. By selecting large numbers of consumers at once, users can enter service deliveries quickly for many consumers.

Using Rosters

Using rosters in SAMS is a two-step process:

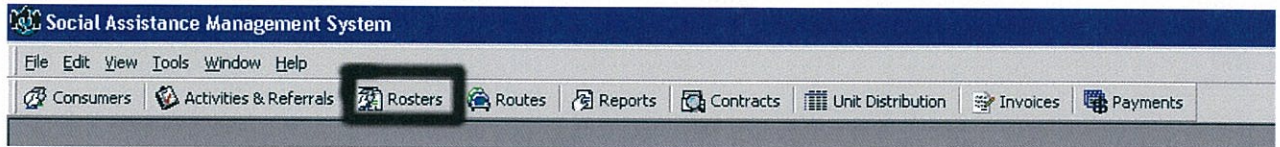
- 1) Creating a *Roster Definition* and then
- 2) Recording service deliveries.

Step One: Creating a Roster Definition

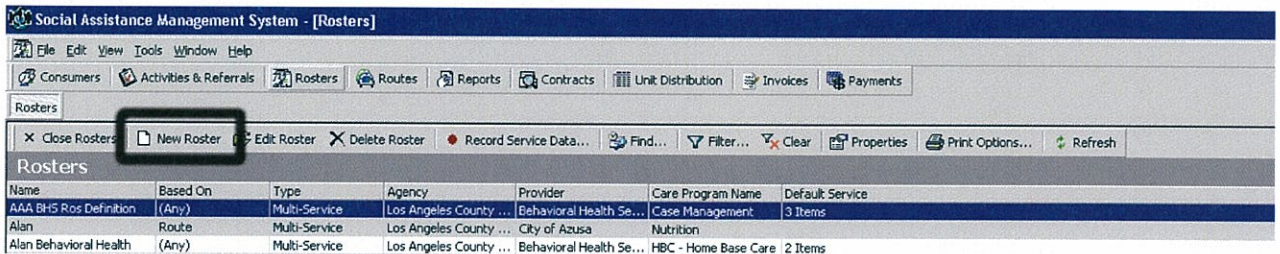
This step involves telling SAMS who you would like to deliver services to.

Hint: Once a Roster definition has been built, you may use it each month to deliver services to your consumers.

1. In SAMS, Press the **Rosters** button.

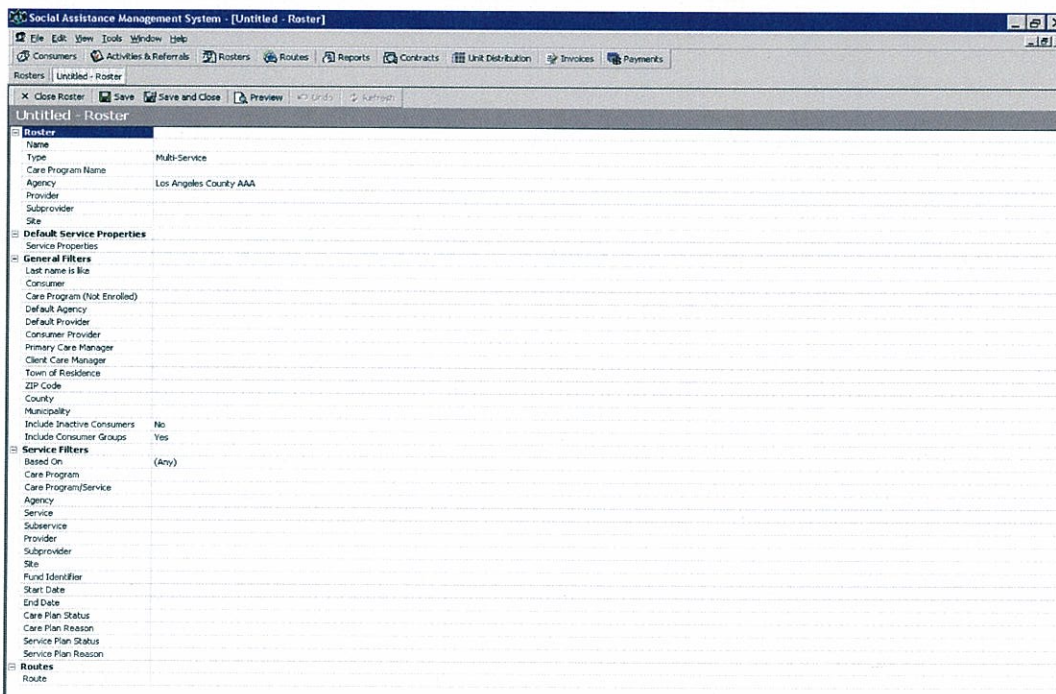


2. Once into the Rosters area, press the **New Roster** button.



3. The New roster screen looks like the screen below. As mentioned before, this screen is where you define who you would like to deliver Services to. This screen is commonly called the Roster Filter screen.

Hint: Use as few Filters as possible to build your Rosters.



Month One Roster Definition for Congregate Meal Services

This type of Roster allows you to deliver Congregate Meal Services. The main benefit to this type of Roster is that it will show which consumers attended each Congregate Meal Site.

The Roster screen below shows (in yellow) the fields that must be filled in the first day you deliver services. The next few pages have a detailed explanation of each of the fields involved.

Untitled - Roster	
Roster	
Name	
Type	Multi-Service
Care Program Name	
Agency	Los Angeles County AAA
Provider	
Subprovider	
Site	
Default Service Properties	
Service Properties	
General Filters	
Last name is like	
Consumer	
Care Program (Not Enrolled)	
Default Agency	
Default Provider	
Consumer Provider	
Primary Care Manager	
Client Care Manager	
Town of Residence	
ZIP Code	
County	
Municipality	
Include Inactive Consumers	No
Include Consumer Groups	Yes
Service Filters	
Based On	(Any)
Care Program	
Care Program/Service	
Agency	
Service	
Subservice	
Provider	
Subprovider	
Site	
Fund Identifier	
Start Date	
End Date	
Care Plan Status	
Care Plan Reason	
Service Plan Status	
Service Plan Reason	
Routes	
Route	

1. The Name Field

The Name field is simply used for naming your Roster so that you may find it on the list later. We recommend that you put your Provider name in front of every Roster definition.

Name	Fill in the roster Name here. Example: Antelope Valley HBC Roster
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2. The Type Field

The Type field tells SAMS what type of Roster you are going to use. SAMS offers four types of rosters: *Multi-Service*, *Service Plan (Multi-Service)*, *Service Plan (Specified Service)*, or *Specified Service*.

A *Specified Service* roster only records one kind of service to the list of consumers.

A *Multi-Service* roster can record different services to the same consumer list.

Service Plan rosters generate lists of consumers based on care plan service allocations.

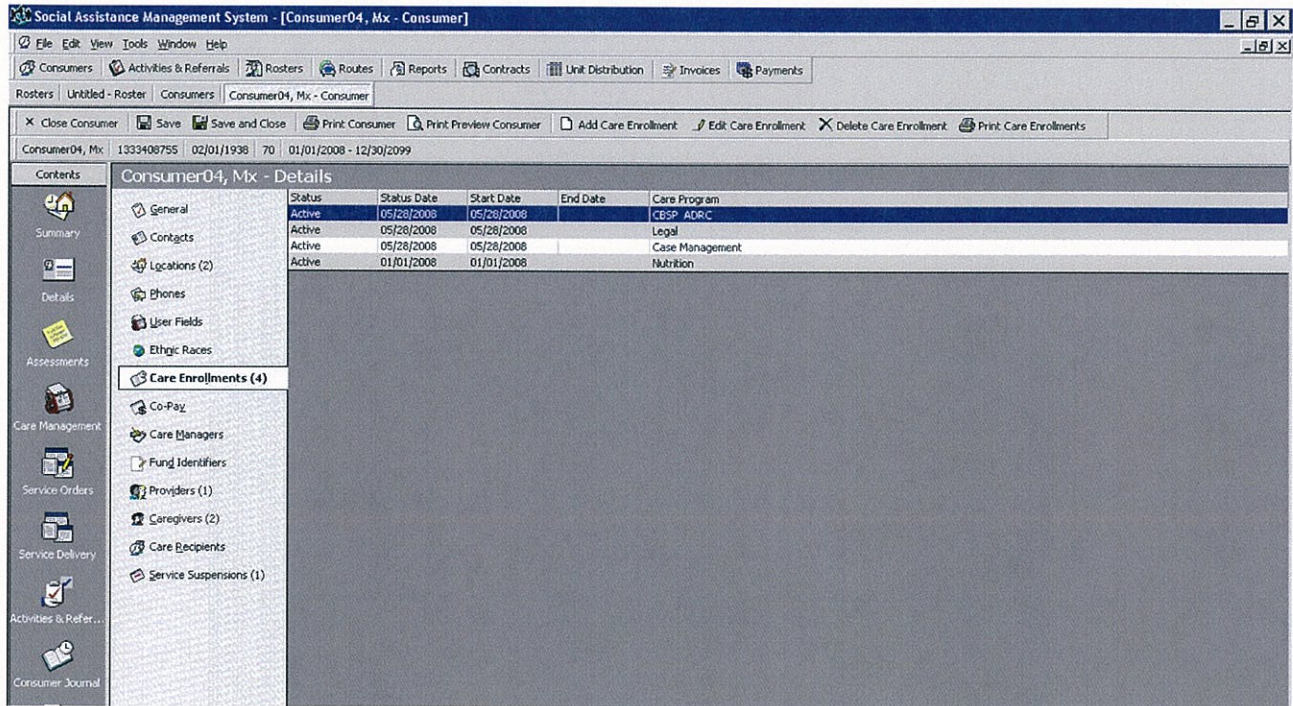
Note: When you're building your Rosters, you should choose either *Multi-Service* or *Single Service*.

The screenshot displays the SAMS application window titled 'Social Assistance Management System - [Untitled - Roster]'. The menu bar includes File, Edit, View, Tools, Window, and Help. The toolbar contains icons for Consumers, Activities & Referrals, Rosters, Routes, Reports, Contracts, Unit Distribution, Invoices, and Payments. The 'Rosters' tab is active, showing a sub-tab 'Untitled - Roster'. Below the toolbar is a row of buttons: Close Roster, Save, Save and Close, Preview, Undo, and Refresh. The main form area is titled 'Untitled - Roster' and contains several sections:

- Roster**
 - Name: (empty text field)
 - Type: Multi-Service (dropdown menu)
 - Care Program Name: Multi-Service (dropdown menu)
 - Agency: Service Plan (Multi-Service) (dropdown menu)
 - Provider: Service Plan (Specified Service) (dropdown menu)
 - Subprovider: Specified Service (dropdown menu)
 - Site: (empty text field)
- Default Service Properties**
 - Service Properties: (empty text field)
- General Filters**
 - Last name is like: (empty text field)
 - Consumer: (empty text field)

3. The Care Program Name Field

SAMS requires the designation of a Care Program for each Roster. The Care Program is equivalent to the Care Enrollment designation on the Consumer record, as seen below:



Consumer04, Mx - Details

Status	Status Date	Start Date	End Date	Care Program
Active	05/28/2008	05/28/2008		CBSP ADRC
Active	05/28/2008	05/28/2008		Legal
Active	05/28/2008	05/28/2008		Case Management
Active	01/01/2008	01/01/2008		Nutrition

Hint: Each Roster can only have one Care Program (Care Enrollment.)

In the Case of Congregate Meals, the Care Program Name would be Nutrition.

Care Program Name	Fill in the Care Program / Care Enrollment Here
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4. The Agency Field

The *Agency* field should always be filled in with *Los Angeles County AAA*, as shown below.

The screenshot shows the 'Social Assistance Management System - [Untitled - Roster]' window. The 'Roster' tab is active, and the 'Agency' field is set to 'Los Angeles County AAA'. The 'Provider' field is empty. The 'Default Service Properties' section is expanded, showing 'Service Properties'.

Roster	
Name	
Type	Multi-Service
Care Program Name	
Agency	Los Angeles County AAA
Provider	
Subprovider	
Site	
Default Service Properties	
Service Properties	

5. The Provider Field

The *Provider* field should show your Provider name. Choose your Provider name from the dropdown list.

The screenshot shows the 'Social Assistance Management System - [Untitled - Roster]' window. The 'Roster' tab is active, and the 'Provider' field is set to 'AltaMed Health Services'. The 'Agency' field is set to 'Los Angeles County AAA'. The 'Default Service Properties' section is expanded, showing 'Service Properties' and 'General Filters'.


Roster	
Name	
Type	Multi-Service
Care Program Name	
Agency	Los Angeles County AAA
Provider	AltaMed Health Services
Subprovider	
Site	
Default Service Properties	
Service Properties	
General Filters	
Last name is like	

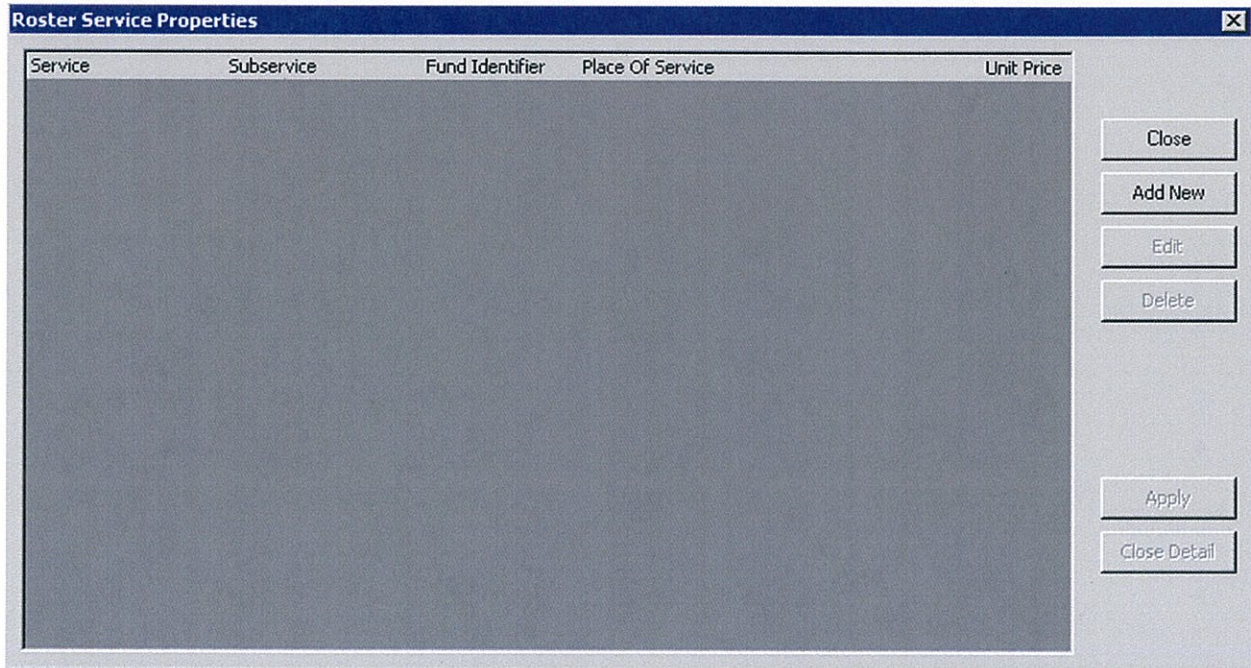
6. The Site Field

You will have a separate Roster for each Congregate Meal site you have. Specify the Site name in this field. If you do not see your Site name in this field, please call or email CSS Technical Support.

7. The Service Properties Field

This field tells SAMS what Congregate Meal Services you wish to deliver on the Roster.

- a. Click on the Service Properties field.
- b. Click on the grey box at the far right of the field. 
- c. The next screen is the Roster Service Properties screen. This is where you add the Services you wish to deliver.



Service	Subservice	Fund Identifier	Place Of Service	Unit Price
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Close

Add New

Edit

Delete

Apply

Close Detail

- d. Click the *Add New* button.

Add New

- e. After you click the *Add New* button, a new “Service Properties” Window will appear with additional options, as shown below. The two fields that you must fill out here are the **Service** and the **Fund Identifier** fields.

Service	Subservice	Fund Identifier	Place Of Service	Unit Price
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Service Properties

Service

Subservice

Fund Identifier

Place of Service

Unit Price

\$0.00

- f. After you add the first Service, click the **Apply** button.
- g. If you are constructing a Multi-Service Roster, click the **Add New** button again and repeat steps e and f again until all Services you wish to deliver are added.

- h. Click the **Close** button in the Roster Service Properties window.

Check your work and press the **Save and Close** button.

Note: You will need to press the **Refresh** button to see your Roster on the list.

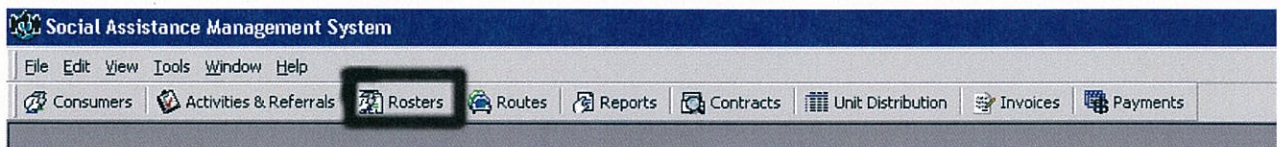
Month Two and Beyond Roster Definition

After you deliver Services for the first month, you will need to adjust the filters on the rosters you have built. The reason for this adjustment is to hold Consumers OFF from the Roster so that it doesn't get too long and difficult to manage.

We recommend that you adjust the filters to hold off any Consumer who has not received a Service Delivery within the past month. Adding these simple filters in month two and beyond will keep the list of consumers manageable so that it will not include people who have stopped receiving Services because they have passed away, or have moved.

Before delivering Services in month two and beyond:

1. In SAMS, Press the **Rosters** button.



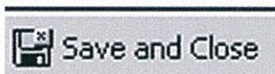
2. Find the Roster on the list and Double-Click into it.

The new filters we will add are under the *Service Filters* section:

Service Filters	
Based On	Service Delivery
Care Program	
Care Program/Service	
Agency	
Service	
Subservice	
Provider	
Subprovider	
Site	
Fund Identifier	
Start Date	
End Date	
Care Plan Status	
Care Plan Reason	
Service Plan Status	
Service Plan Reason	

- a. In the *Based On* field, Choose *Service Delivery*
- b. In the *Start Date* field, we suggest that you put the first day of the prior month.
- c. In the *End Date* field, we suggest that you put the last day of the prior month.

3. Click the **Save and Close** button.

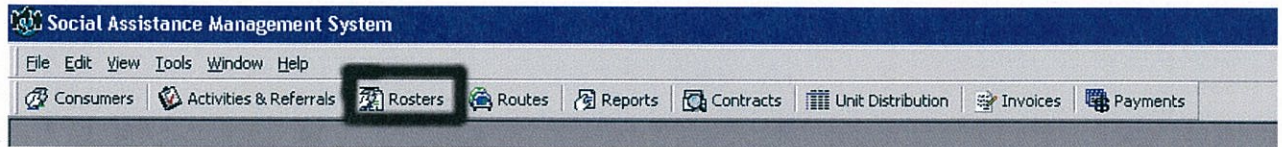


Each month, we recommend that you double-click on each Roster and change the *Start Date* and *End Date* fields, to keep your Rosters manageable.

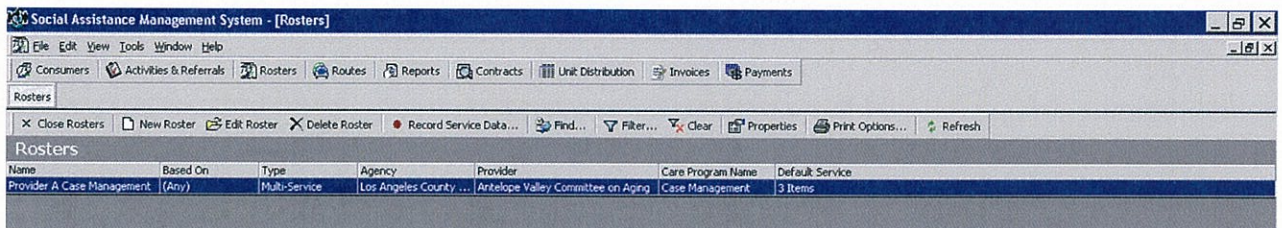
Step Two: Recording Service Deliveries

After you have built your Roster Definition in Step One, the next step is to Record your Service Deliveries.

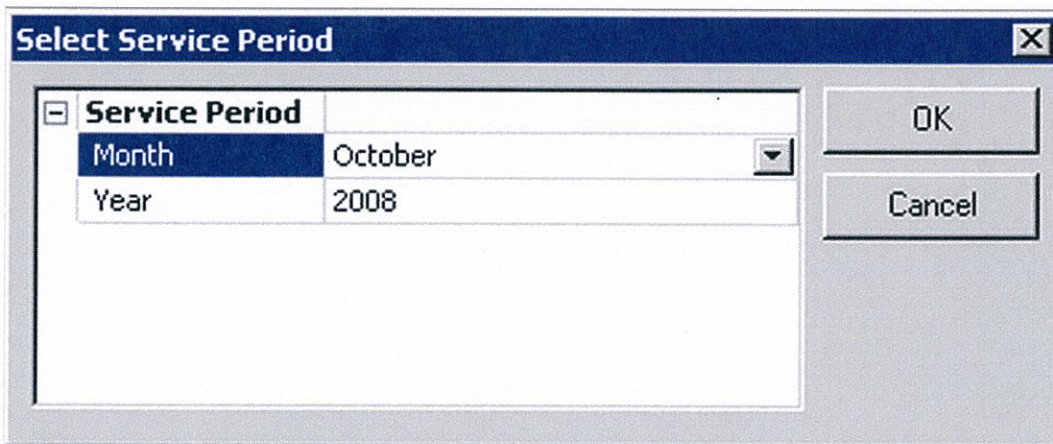
1. In SAMS, Press the **Rosters** button.



2. Highlight the Roster you wish to record services for as show below.
Do not double-click into the Roster.



3. Click the **Record Service Data** button.
4. In the next window, choose the month and year you wish to record services for.



- On the next screen you will be able to enter your Service deliveries in the appropriate day field.

Alan Behavioral Health - Roster Services

X Close Roster

Save

Save and Close

Print Roster...

Add Consumers

Find Consumers

Add Service

View Contract

July

2008

Refresh

Columns

Totals

Suppress Zero Units

Grouping

Service

Multi-Service Roster

HBC - Home Base Care

Los Angeles County AAA

Behavioral Health Services, Inc.


Client	Fund Identifier	Subservice	Total Units	Tue 01	Wed 02	Thu 03	Fri 04	Sat 05	Sun 06	Mon 07	Tue 08	Wed 09	Thu 10	Fri 11	Sat 12	Sun 13	Mon 14	Tue 15	Wed 16	Thu 17	Fri 18	Sat 19
III-B HBC Homemaker			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Baca, Melody (1329153079)	III-B																					
Bill Stewart	III-B																					
Boykins, Stephanie (1313846987)	III-B																					
Carrillo, Raudel (1323537844)	III-B																					
Cervantes miss, Vilma (1361637514)	III-B																					
Chan, Grace (1315684146)	III-B																					
Clark III, Kent (1337720888)	III-B																					
Garcia, Veronica (1385657900)	III-B																					
Hinkle, Leona (1310544985)	III-B																					
How To Hire Seminar-RC	III-B																					
Jose, Canseco (1372260683)	III-B																					
Kitty, Hello (1378088015)	III-B																					
Larson, Bill A (1381428163)	III-B																					
Lin, Kuanyin (1300123233)	III-B																					
lola lounge	III-B																					
Pitt, Cynthia P (1387653749)	III-B																					
Rodriguez -, Bonnie - (1377390007)	III-B																					
Sanchez, Nikkole (1373608034)	III-B																					
Simpson III, Bartholomew (1332835024)	III-B																					
Stewart, Bill (1351162356)	III-B																					
III-B HBC Personal Care			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Baca, Melody (1329153079)	III-B																					
Bill Stewart	III-B																					
Boykins, Stephanie (1313846987)	III-B																					
Carrillo, Raudel (1323537844)	III-B																					
Cervantes miss, Vilma (1361637514)	III-B																					
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Jose, Canseco (1372260683)	III-B																					
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Rodriguez -, Bonnie - (1377390007)	III-B																					
Sanchez, Nikkole (1373608034)	III-B																					
Simpson III, Bartholomew (1332835024)	III-B																					
Stewart, Bill (1351162356)	III-B																					
			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

- We recommend that you move around the Roster data entry screen by using your Arrow keys.

- You may also use the "Grouping" button to change the way the screen displays Consumers, based on your data entry preference.

Grouping
Service

- When your Service Delivery data entry is complete, press the "Save and Close" button.


Save and Close